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www.jama-english.jp

June 2012
Japanese Automakers in the EU
A Firm Commitment to Promoting Growth and Sustainability

Japanese automakers’ extensive investments in Europe since 1986, which marked the start of their production activities in the region, have led to a progressive expansion of their operations in the EU, rooting them firmly within the fabric of local communities and the European community at large.

The economic contributions that JAMA member companies make in Europe underscore their commitment to the region. In 2011, with 13 production plants and 12 R&D and design centres in operation in the EU, Japanese automakers’ EU production volume reached 1.30 million vehicles, or more than 70% of all Japanese-branded vehicles sold in the region. Directly in those operations and indirectly in sales, distribution and other related activities, an unprecedented 164,274 people were employed across the EU. In addition, EU-made parts purchases by the Japanese automakers totalled €11.75 billion in 2011, while exports from the EU of EU-made Japanese models grew to 241,233 units.

The automobile industry worldwide must today address a host of potentially ground-shifting challenges, including intensifying competition in mature as well as emerging markets; continuously diversifying consumer needs; urgent issues pertaining to the global environment and energy supply; and the growing social imperative of achieving greater safety in road transport. In addressing such challenges, JAMA members constantly strive, through their EU-based R&D centres, to manufacture vehicles in Europe that meet the needs of European users. And in response to the challenges posed by the task of achieving low-carbon, energy-conserving transport, JAMA members are aggressively introducing advanced environmental technologies as well as new-generation green vehicles and promoting their development and diffusion in Europe, in many cases through wide-ranging initiatives undertaken jointly with European partners at both the public and private levels.

Dealing with pervasive economic uncertainty in Europe and Japan is an additional major challenge. The sustainability of the automotive industry, as a core sector driving growth, will be a key factor in strengthening the European and Japanese economies. Achieving such sustainability will require revitalisation of the vehicle markets in Europe and Japan and improvements in the business environment. JAMA members believe that strengthened economic cooperation between the EU and Japan, together with closer cooperation in establishing harmonised automotive technical regulations, will provide a new momentum for sustainable growth not only in the European and Japanese economies, but in the global economy as well.

Japanese automakers are determined to contribute to the further advancement of the automobile industry in Europe and the continued satisfaction of European vehicle users. This booklet is compiled annually in order to provide readers with the opportunity to deepen their understanding of the commitment of JAMA members to the European Union.
Japanese Automakers in the EU
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**Production Facilities in the European Union**

<table>
<thead>
<tr>
<th>Manufacturer</th>
<th>Company</th>
<th>Location (Start of Operation)</th>
<th>Equity Shares</th>
<th>Products</th>
<th>Units Produced in 2010</th>
<th>Units Produced in 2011</th>
<th>Employees</th>
<th>Total Investment (Euro)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>UNITED KINGDOM</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>1 Nissan</td>
<td>Nissan Motor Manufacturing (UK) Ltd.</td>
<td>Sunderland (1984)</td>
<td>100%</td>
<td>Note, Quest, Juke</td>
<td>129,000</td>
<td>129,000</td>
<td>131,000</td>
<td>5,400</td>
</tr>
<tr>
<td>2 Toyota</td>
<td>Toyota Motor Manufacturing (UK) Ltd.</td>
<td>Burnaston, Derby (1996)</td>
<td>TME 100%</td>
<td>Corolla, Yaris, Yaris Hybrid</td>
<td>137,000</td>
<td>138,000</td>
<td>139,000</td>
<td>3,500</td>
</tr>
<tr>
<td>3 Honda</td>
<td>Honda of the UK Manufacturing Ltd. (JACM)</td>
<td>Swindon (1983)</td>
<td>TME 100%</td>
<td>Civic, CR-V, Jazz Engines</td>
<td>139,000</td>
<td>137,000</td>
<td>137,000</td>
<td>3,080</td>
</tr>
<tr>
<td><strong>FRANCE</strong></td>
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<tr>
<td>4 Toyota</td>
<td>Toyota Motor Manufacturing France S.A.S. (TMEF)</td>
<td>Valenciennes (1983)</td>
<td>TME 94%</td>
<td>Yaris, Yaris Hybrid</td>
<td>127,000</td>
<td>140,000</td>
<td>146,000</td>
<td>4,180</td>
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<tr>
<td><strong>SPAIN</strong></td>
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<td><strong>PORTUGAL</strong></td>
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<tr>
<td>6 Toyota</td>
<td>Toyota Carroços Portugal, S.A.</td>
<td>Coimbra (1996)</td>
<td>TME 100%</td>
<td>Avensis</td>
<td>2,500</td>
<td>1,400</td>
<td>1,900</td>
<td>N/A</td>
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<td><strong>THE NETHERLANDS</strong></td>
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<tr>
<td>7 Mitsubishi Fuso</td>
<td>Mitsubishi Fuso Truck Europe S.A. (MFT/E)</td>
<td>Transvaal (1946)</td>
<td>TME 100%</td>
<td>Canter</td>
<td>5,840</td>
<td>5,840</td>
<td>5,840</td>
<td>332</td>
</tr>
<tr>
<td><strong>HUNGARY</strong></td>
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<tr>
<td>8 Suzuki</td>
<td>Suzuki Motor Manufacturing Hungary Ltd. (SMHU)</td>
<td>Kecskemét (1992)</td>
<td>TME 40%</td>
<td>Swift, SX4</td>
<td>170,000</td>
<td>170,000</td>
<td>170,000</td>
<td>4,651</td>
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<tr>
<td><strong>POLAND</strong></td>
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</tr>
<tr>
<td>9 Isuzu</td>
<td>Isuzu Motors Europe SA (IMESA)</td>
<td>Markaryd (1968)</td>
<td>TME 50%</td>
<td>ISUZU, Giga, Elf, Giga coaster</td>
<td>182,000</td>
<td>146,000</td>
<td>146,000</td>
<td>684</td>
</tr>
<tr>
<td>10 Toyota</td>
<td>Toyota Motor Manufacturing Poland S.A. (TMMPL)</td>
<td>Swieta Góra (2003)</td>
<td>TME 100%</td>
<td>Corolla, RAV4, Hiace, Land Cruiser</td>
<td>129,000</td>
<td>130,000</td>
<td>131,000</td>
<td>3,000</td>
</tr>
<tr>
<td>11 Toyota</td>
<td>Toyota Motor Manufacturing Poland Sp. z o.o. (TMEPL)</td>
<td>Swieta Góra (2006)</td>
<td>TME 100%</td>
<td>Yaris, MR2, RAV4, Hiace, Land Cruiser</td>
<td>129,000</td>
<td>130,000</td>
<td>131,000</td>
<td>3,000</td>
</tr>
<tr>
<td><strong>CZECH REPUBLIC</strong></td>
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</tr>
<tr>
<td>12 Toyota</td>
<td>Toyota Motor Manufacturing Czech Republic, a.s.</td>
<td>Kolin (2004)</td>
<td>TME 50%</td>
<td>Yaris, Yaris Hybrid, Auris, Avensis</td>
<td>120,000</td>
<td>120,000</td>
<td>120,000</td>
<td>3,580</td>
</tr>
<tr>
<td>13 Toyota</td>
<td>Toyota Motor Manufacturing Austria, a.s.</td>
<td>Graz (2005)</td>
<td>TME 60%</td>
<td>Yaris, Yaris Hybrid, Auris, Avensis</td>
<td>120,000</td>
<td>120,000</td>
<td>120,000</td>
<td>3,580</td>
</tr>
</tbody>
</table>

**Common Challenges, Common Future**  
Japanese Auto Manufacturers Contribute to the Competitiveness of Europe’s Motor Industry

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Japanese automakers manufacture vehicles and engines to meet the needs of European consumers.

Japanese automakers currently operate 13 production facilities in eight EU countries.

Japanese automakers manufactured 1.30 million vehicles and employed 32,953 people in their EU production operations in 2011.
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Japanese automakers conduct R&D and design activities in conjunction with their production operations in Europe. Japanese automakers currently operate 12 R&D and design centres in five EU countries.

R&D and design activities in the EU are aimed at meeting the specific needs of the European market. JAMA members’ R&D and design activities in the EU employed 1,941 people in 2011.

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Mitsubishi Motor R&D Europe G.m.b.H., Trebur, Germany

Nissan Technical Centre Europe Ltd., Cranfield, UK

**Key to Functions:**

1. Technical support for procurement of parts for local production
2. Evaluation of parts
3. Evaluation of vehicles
4. Styling and general design
5. Parts design
6. Vehicle design
7. Prototype production
8. Marketing research
9. Development of racing cars
10. Engine application development with vehicle validation
11. Type approval and homologation
12. Field problem investigation

**United Kingdom**

1. Honda
   - Company: Honda R&D Europe (UK) Ltd.
   - Headquarters: Swindon
   - Division Offices: N/A
   - Employees: 1,2,3,5,6,7,8,12
   - Current Functions: 1,2,3,6,7,8,12

2. Nissan
   - Company: Nissan Design Europe Ltd.
   - Headquarters: London
   - Division Offices: 86
   - Employees: 4
   - Current Functions: 4

**Germany**

3. Honda
   - Company: Honda R&D Europe (Deutschland) G.m.b.H.
   - Headquarters: Offenbach
   - Division Offices: N/A
   - Employees: 1,2,3,8,11,12
   - Current Functions: 1,2,3,8,11,12

4. Isuzu
   - Company: Isuzu Motors Europe G.m.b.H.
   - Headquarters: Gustavsburg
   - Division Offices: 125
   - Employees: 1,2,3,10,11,12
   - Current Functions: 1,2,3,10,11,12

5. Mazda
   - Company: Mazda Motor Europe G.m.b.H.
   - Headquarters: Oberndorf
   - Division Offices: 75
   - Employees: 3,4,6
   - Current Functions: 3,4,6

6. Mitsubishi
   - Company: Mitsubishi Motor R&D Europe G.m.b.H.
   - Headquarters: Trebur
   - Division Offices: 43
   - Employees: 2,3,10,11,12
   - Current Functions: 2,3,10,11,12

7. Toyota
   - Company: Toyota Motor Europe G.m.b.H.
   - Headquarters: Köln
   - Division Offices: 250
   - Employees: 2,3,9
   - Current Functions: 2,3,9

8. Subaru
   - Company: Subaru Test & Development Center (STDC)
   - Headquarters: Ingelheim am Rhein
   - Division Offices: 8
   - Employees: 3,4
   - Current Functions: 3,4

**France**

9. Toyota
   - Company: Toyota Europe Design Development S.A.R.L. (TDD)
   - Headquarters: Nice
   - Division Offices: 40
   - Employees: 45,6,7,9
   - Current Functions: 45,6,7,9

**Belgium**

10. Subaru
    - Company: Subaru Europe NV/SA
    - Headquarters: Zaventem
    - Division Offices: 41
    - Employees: 2,3,6,11,12
    - Current Functions: 2,3,6,11,12

11. Toyota
    - Company: Toyota Motor Europe NV/SA
    - Headquarters: Burnaston, UK
    - Division Offices: 420
    - Employees: 1,2,3,5
    - Current Functions: 1,2,3,5

12. Nissan
    - Company: Nissan Technical Centre Europe Ltd.
    - Headquarters: Cranfield, UK
    - Division Offices: Barcelona/Malaga, Spain; Brussels, Belgium; Brühl, Germany
    - Employees: 705
    - Current Functions: 2,3,6,7,8,10,11
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JAMA members’ R&D and design activities in the EU employed 1,941 people in 2011.

Japanese Auto Manufacturers Contribute to the Competitiveness of Europe’s Motor Industry

Common Challenges, Common Future
In 2011, EU production by Japanese automakers increased to 1.30 million units, or more than 70% of all Japanese-branded vehicles sold in the EU. In addition, exports of Japanese models produced in the EU rose very significantly in 2011—to 241,233 units from the 94,260 units exported in 2010.

Japanese Automakers’ Purchases of EU Parts

At the European production facilities of Japanese automakers, European suppliers deliver more than 80% of the value of the parts. European suppliers with high levels of outsourcing and looking for a long-term relationship are potentially excellent partners for Japanese automakers. JAMA members open their contact points to potential suppliers in order to pursue maximised global purchasing.

New Investment and Employment in the EU

In 2011, 164,274 people were employed through the activities of Japanese automakers in the EU:

- 34,894 directly, with 32,953 in production and 1,941 in R&D.
- 129,380 indirectly, by headquarters and parts distribution centres as well as in distribution, financial services and sales.

By creating high-skill jobs, Japanese automakers have contributed to the dynamism of the EU economy.

EU-Based Partnership Projects

EU-based partnership projects (public-private/private) promoting the dissemination of environmentally-friendly vehicle technologies [Partial listing]

<table>
<thead>
<tr>
<th>Company</th>
<th>EU partner</th>
<th>Location</th>
<th>Date announced</th>
<th>Project description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Honda</td>
<td>Ford Motor Company</td>
<td>Sunderland, UK</td>
<td>Sep 28, 2011</td>
<td>Establishment of open-access hydrogen refuelling station</td>
</tr>
<tr>
<td>Mitsubishi</td>
<td>Government of Estonia</td>
<td>Estonia</td>
<td>Mar 8, 2011</td>
<td>Delivery of 65 i-MiEV under the Green Innovation Scheme (GIS) for use in public facilities</td>
</tr>
<tr>
<td>Nissan</td>
<td>City of Amsterdam</td>
<td>Netherlands</td>
<td>Sep 30, 2010</td>
<td>Air conditioning of zero-emissions mobility and EVs</td>
</tr>
<tr>
<td>BMW</td>
<td>Intelligent Energy</td>
<td>Loughborough, UK</td>
<td>Feb 7, 2012</td>
<td>Establishment of a joint venture company for developing and manufacturing a fuel-cell system</td>
</tr>
<tr>
<td>Toyota</td>
<td>Electricité de France</td>
<td>Bondoufle, France</td>
<td>Apr 27, 2013</td>
<td>Test demonstrations for future popularisation of PHVs</td>
</tr>
</tbody>
</table>

Honda-Forward Swindon, BOC, Swindon, UK
Suzuki-Intelligent Energy, Loughborough, UK

Honda-Forward Swindon, BOC, Swindon, UK
Suzuki-Intelligent Energy, Loughborough, UK
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- 129,380 indirectly, by headquarters and parts distribution centres as well as in distribution, financial services and sales.

### EU-Based Partnership Projects

<table>
<thead>
<tr>
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<th>EU partner</th>
<th>Location</th>
<th>Date announced</th>
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</tr>
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<tbody>
<tr>
<td>Mitsubishi</td>
<td>Government of Catalonia</td>
<td>Barcelona, Spain</td>
<td>Mar 4, 2011</td>
<td>Deployment of 150 i-MiEVs under the Green Innovation Scheme (GIS) for use in public facilities.</td>
</tr>
<tr>
<td>Nissan</td>
<td>City of Amsterdam</td>
<td>Amsterdam, Netherlands</td>
<td>Sep 22, 2013</td>
<td>Air conditioning of passenger cars with an emission level of CO2 of EU 116.</td>
</tr>
<tr>
<td>Toyota</td>
<td>Electrolyse de France</td>
<td>Blanquiers, France</td>
<td>Apr 27, 2010</td>
<td>Test demonstration for future popularisation of PHEVs.</td>
</tr>
</tbody>
</table>

### EU production versus imports by Japanese Automakers

In 2011, EU production by Japanese automakers was €11.75 billion in 2011.

Purchases of European parts by Japanese automakers totalled €11.75 billion in 2011.

European suppliers with high levels of outsourcing and looking for a long-term relationship are potentially excellent partners for Japanese automakers.

JAMA members open their contact points to potential suppliers in order to pursue maximised global purchasing.
Honda
Honda started production of its all-new, five-door Civic at its Swindon plant in Swindon, UK, in December 2011. The new Civic has been designed and developed solely for the European market and will be built only in Britain. With its ongoing production of the Jazz and, soon, a new European CR-V and a new, highly efficient, lightweight Civic diesel (featuring a 1.6-litre engine), the Swindon factory’s second assembly line started double shifts in May 2012, creating 500 new jobs. Production volume at Swindon in 2012 is forecast to double to a total of 180,000 units.

Mazda
Making its European premiere at the 2012 Geneva Motor Show, Mazda’s Takeri next-generation, midsize sedan concept car features the full array of Mazda’s SKYACTIV technologies, including the efficient and powerful new SKYACTIV-D clean diesel engine, to deliver vigorous performance and a comfortable ride. Those technologies, in combination with Mazda’s i-stop idling-prevention technology and i-ELOOP regenerative braking system, enable the Takeri to achieve excellent fuel economy.

Mitsubishi
The 2012 Geneva Motor Show saw the global debut of MMC’s new-generation Outlander, showcasing not only its high fuel efficiency and low CO2 emission levels—among the best in its class—but also its enhanced safety performance and a user-friendly interior of outstanding new-generation. The 2012 Geneva Motor Show saw the global debut of MMC’s existing EV technology.

Nissan
In September 2011, Nissan’s Sunderland, UK plant marked the 25th anniversary of its official opening. Over the past quarter-century, this plant has rewritten the record books for UK car production, with volumes increasing from 5,139 units in its first year to 423,262 in 2010—the first time ever that a UK car plant produced more than 400,000 vehicles annually. Nissan has now manufactured 12 different models (including the Bluebird, Primera, Micra, Almera, Note, Qashqai and Juke) at Sunderland, whose roughly 5,000-strong staff produced their six-millionth car in January 2011.

Toyota
Toyota’s TMMF plant in Valenciennes, France, launched production of the Yaris hybrid in April 2012, with an investment of €25 million for its manufacture. With its downsized full hybrid system, the Yaris HV (the first full hybrid in Europe’s B-segment) boasts fuel consumption of 3.5L/100km, equivalent to 79gCO2/km, setting new benchmarks in this segment. Toyota has sold more than 400,000 full hybrid vehicles in Europe; is planning to introduce about 10 new hybrid models globally by 2015; and will continue the development of PHEVs, EVs and FCEVs by positioning hybrid technology as a core technology.

Common Challenges, Common Future
Japanese Auto Manufacturers Contribute to the Competitiveness of Europe’s Motor Industry

Automotive Ties between Europe and Japan

EU
Japan

Supply of engines
Lithium-ion battery collaborative research

Toyota

Supply of finished vehicles jointly developed in the EU
Supply of diesel engines

Peugeot Citroën Automobile Czech (Czech Republic)

Supply of engines
50% equity stake

 PSA Peugeot Citroën (France)

Supply of finished vehicles
Supply of diesel engines

Renault (France)

Supply of engine spare parts
44.3% equity stake

Nissan

Supply of engine spare parts
15% equity stake

Toyota

Supply of finished vehicles jointly developed in the EU
Supply of diesel engines

Suzuki

Supply of finished vehicles jointly developed in the EU
Supply of diesel engines

Isuzu

Supply of diesel engines

Subaru

Supply of finished vehicles

EU
Japan

Supply of diesel engines

Supply of engine spare parts

Cooperative sales ties in the Japanese market

Toyota

AB Volvo (Sweden)

Supply of diesel engines

100% equity stake

BMW (Germany)

Supply of diesel engines

Mitsubishi

Supply of finished vehicles

Daimler (Germany)

Supply of engine spare parts

3.1% equity stake

Porsche (Germany)

Supply of engines

Suzuki

50% equity stake

Toyota

Supply of finished vehicles

Daimler (Germany)

Supply of diesel engines

3.1% equity stake

Toyota

Supply of engine spare parts

15% equity stake

Porsche (Germany)

Supply of engines

Suzuki

50% equity stake

Toyota
Honda
Honda started production of its all-new, five-door Civic at its HUM plant in Swindon, UK, in December 2011. The new Civic has been designed and developed solely for the European market and will be built only in Britain. With its ongoing production of the Jazz and, soon, a new European CR-V and a new, highly efficient, lightweight Civic diesel (featuring a 1.6-litre engine), the Swindon factory’s second assembly line started double shifts in May 2012, creating 500 new jobs. Production volume at Swindon in 2012 is forecast to double to a total of 180,000 units.

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Mitsubishi
The 2012 Geneva Motor Show saw the global debut of MMC’s new-generation Outlander, showcasing not only its high fuel efficiency and low CO2 emission levels—among the best in its class—but also its enhanced safety performance and a user-friendly interior of outstanding quality. The new Outlander will be launched in Russia this summer, then introduced to other markets in Europe and to Japan, Oceania, China, and North America. During fiscal 2012 MMC will also be adding to its lineup an Outlander plug-in hybrid, developed on the basis of MMC’s existing EV technology.

Nissan
In September 2011, Nissan’s Sunderland, UK plant marked the 25th anniversary of its official opening. Over the past quarter-century, this plant has rewritten the record books for UK car production, with volumes increasing from 5,139 units in its first year to 423,262 in 2010—the first time ever that a UK car plant produced more than 400,000 vehicles annually. Nissan has now manufactured 12 different models (including the Bluebird, Primera, Micra, Almera, Note, Qashqai and Juke) at Sunderland, whose roughly 5,000-strong staff produced their six-millionth car in January 2011.

Toyota
Toyota’s TMMF plant in Valenciennes, France, launched production of the Yaris hybrid in April 2012, with an investment of 625 million for its manufacture. With its downsized full hybrid system, the Yaris HV (the first full hybrid in Europe’s B-segment) boasts fuel consumption of 3.5L/100km, equivalent to 79gCO2/km, setting new benchmarks in this segment. Toyota has sold more than 400,000 full hybrid vehicles in Europe; is planning to introduce about 10 new hybrid models globally by 2015; and will continue the development of PHEVs, EVs and FCEVs by positioning hybrid technology as a core technology.

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